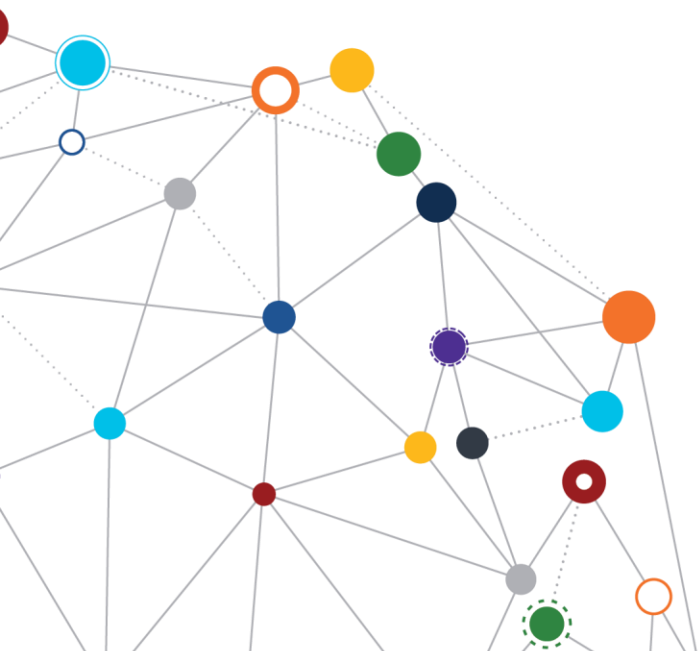




VS GUI User Guide Addendum

Release 1.7.2.1 Update



VA



U.S. Department of Veterans Affairs
Office of Information and Technology
Enterprise Program Management Office



Revision History

Date	Revision	Description	Author
11/16/2020	1.3	Updated the document to reflect the new version of VS GUI 1.7.2.1.	REDACTED
10/23/2020	1.2	All changes are accepted and Updated Section 3.2, table of contents and figures.	HSP REDACTED
10/15/2020	1.1	Updated Section 3.1.3 and 3.2, Fixed bullets, Updated table of contents and figures.	HSP REDACTED
10/06/2020	1.0	Created 1.7.2 Release Update Feature Documentation	REDACTED

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1 Introduction

Department of Veterans Affairs (VA) Veterans Health Information Systems and Technology Architecture (VistA) Scheduling Graphical User Interface (VS GUI) module is the Windows GUI version of the Patient Information Management System (PIMS) Scheduling module. It provides appointment management functions included in PIMS Scheduling, but with the added convenience and usability of a GUI.

1.1 Purpose

The Veterans Health Administration (VHA) Office of Veterans Access to Care (OVAC) requested an enterprise enhancement for the VS package that supports COVID-19 response. The enhancement reduces operating costs for VHA and improves operational efficiencies, resulting in patient-centered access to care, coordinated care, increased customer satisfaction, and the reduction of excessive cycle/wait time for scheduling patients.

1.2 Overview

VS GUI is a software module that allows schedulers to make appointments quickly by viewing multiple appointment request types and multiple clinics in one screen. A scheduler can easily view patient requests for service, find the next available open appointment, view the provider's availability in multiple clinics, and track a patient's appointment process. Refer to [System Summary](#) for a more detailed description of VS GUI functionality.

1.3 Disclaimers

1.3.1 Software Disclaimers

This software was developed at the Department of Veterans Affairs (VA) by employees of the Federal Government in the course of their official duties. Pursuant to title 17 Section 105 of the United States Code this software is not subject to copyright protection and is in the public domain. VA assumes no responsibility whatsoever for its use by other parties, and makes no guarantees, expressed or implied, about its quality, reliability, or any other characteristic. We would appreciate acknowledgement if the software is used. This software can be redistributed and/or modified freely if any derivative works bear some notice that they are derived from it, and any modified versions bear some notice that they have been modified.

1.3.2 Documentation Disclaimers

The appearance of external hyperlink references in this manual does not constitute endorsement by the Department of Veterans Affairs (VA) of this Web site or the information, products, or services contained therein. The VA does not exercise any editorial control over the information you may find at these locations. Such links are provided and are consistent with the stated purpose of the VA.

2 System Summary

The VSE project delivers a series of enhancements to legacy VistA Scheduling Version 5.3 via the VS GUI application.

This update is for the nationally released version 1.7.2.1, which includes VS GUI 1.7.2.1 R1 and VistA patch SD*5.3*756. At time of publishing, install period is projected for December 2020.

This update includes the following:

- » Request Management (RM) Grid improvements:
 - New COVID-19 Priority column on the RM Grid, allowing users to sort and filter by the COVID-19 priority noted with Consult Toolbox.
 - *Transfer to EWL* menu option removed, as per VA mandate, so that VS GUI is not adding any requests to the Electronic Wait List (EWL).
 - Removed *EWL*, *VETERAN* and *RTC* from the request type filter in the query tool.
- » A new browser window is auto launched when a video appointment is scheduled.
- » New national hashtag options can be added when cancelling an appointment
 - National hashtags are static, creating consistent cancellation reasons across the Enterprise
 - Updates to national hashtags will be provided via VistA patches (updates)
- » New local hashtag options for appointment cancellations can be customized through a VistA option (no patch required)
- » Addition of warning message if user exceeds character limit in cancellation remarks.

3 Key Feature Updates in Version 1.7.2.1

3.1 RM Grid improvements

3.1.1 New COVID-19 Priority Column

RM grid now includes a COVID-19 Priority column, which displays the priority as designated for the consult in CPRS. The scheduler will be able to view/sort with this option from the RM Grid.

The screenshot shows the VistA Scheduling interface for Division: UNASSIGNED. The top section contains patient information fields (Name, Gender, DOB, etc.) and a search bar. Below this is a table of patient requests. A red box highlights the 'COVID Priority' column, which contains the value 'CV4'. The bottom section shows a calendar for September 2020 and a 'Schedules' panel.

REQUEST	WAIT TIME All Days	COVID Priority	PATIENT NAME	SSN	CA PHONE	CA LETTER	MRTC	SCVISIT	TELEPHONE
CONSULT	1	CV4							(999) 999-9999

Figure 1: There is Now a COVID Priority Column.

3.1.2 Transfer to EWL Menu Option Removed

As per VA mandate VS GUI users will no longer have the option to Transfer to EWL, as the EWL is being discontinued. However, users will still be able to see EWL requests on the RM grid for as long as they exist.

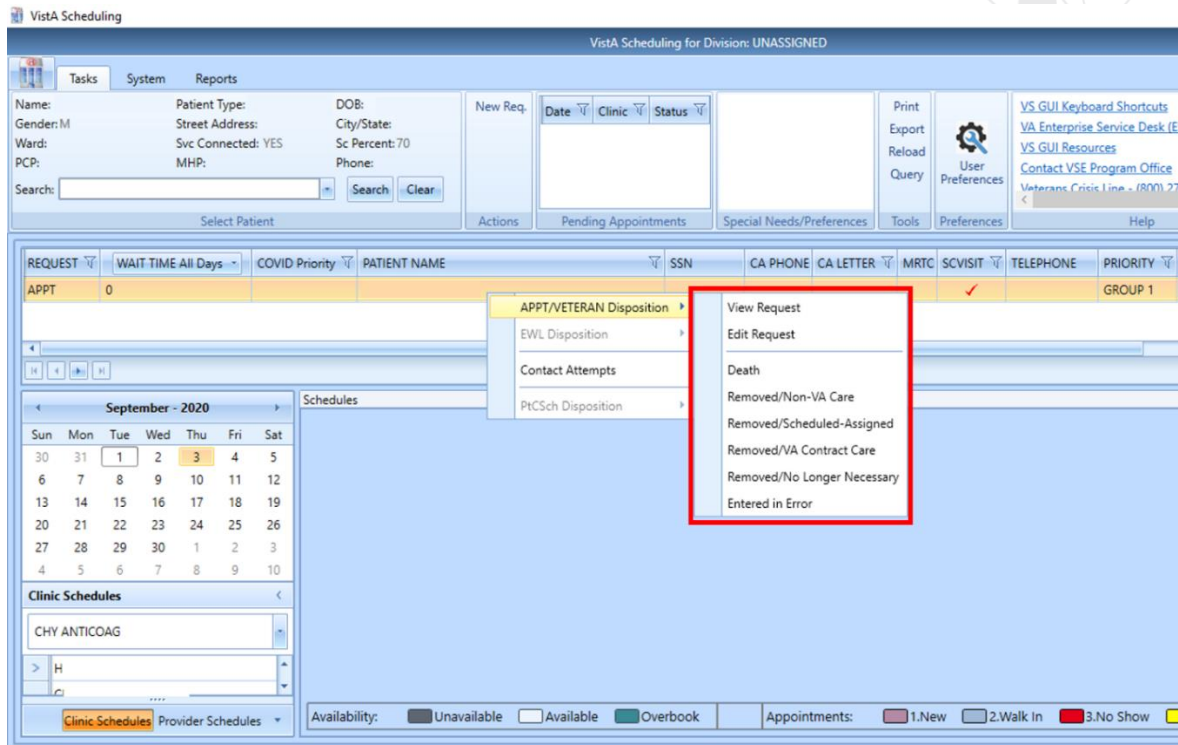


Figure 2: Transfer to EWL Menu option No Longer Available from the RM Grid

3.1.3 Removed EWL, VETERAN and RTC Filter

EWL, VETERAN and RTC filter options are removed and will no longer be available on the request type query filter. Appointment request type is for APPT and RTC request. Consult request type is for Consult and Procedure requests. PtCSch request type is for Recall requests.

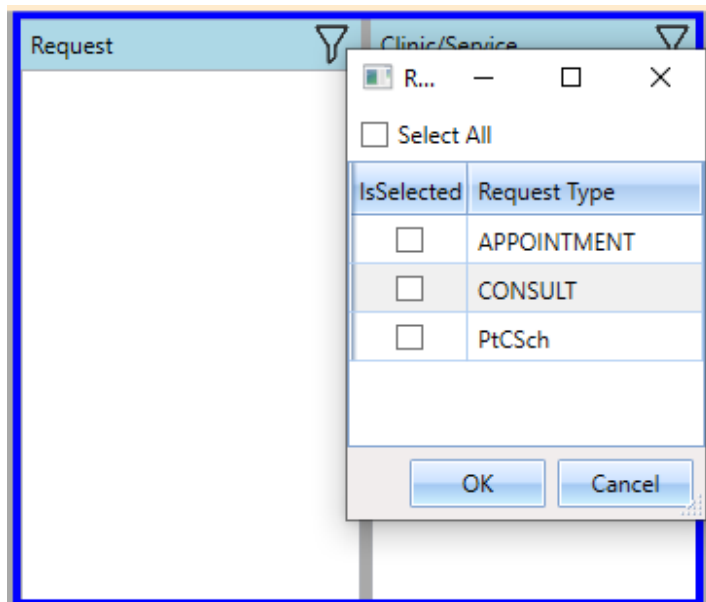


Figure 3: Currently Available Request Type Filters in the Query Tool.

3.2 Introduction of Cancellation Remarks

This release includes standard cancellation remarks routinely used and determined at National and Local levels. Local remarks can be customized by scheduling supervisors and changed as needed.

NOTE: Users must request LAYGO access to Fileman File #409.88 SDEC CANCELLATION COMMENT to be able to add, edit or remove local cancellation reasons.

3.2.1 New National Hashtag Options

The national comment field is a dropdown picklist that allows the user to choose one item from the list of national comments. The tool tip will display when you hover over hashtag.

The screenshot shows the 'Cancel Appointment' dialog box. It features a 'Select National Comment' dropdown menu highlighted with a red rectangle. The dropdown list includes the following options: #TELE#, #VVC#, COVID19, COVID19 #TELE#, COVID19 #VVC#, SRV#TEST#, TEST#LOCAL#, and TESTING 123. Below the dropdown is a 'Remarks (Optional)' text area. To the left of the dropdown is a list of 'Reason for Cancellation' options, including 'APPOINTMENT NO LONGER REQUIRED', 'CLINIC CANCELLED', 'CLINIC STAFFING', 'INPATIENT STATUS', 'OTHER', 'PANDEMIC', 'PATIENT DEATH', 'PATIENT NOT ELIGIBLE', 'SCHEDULING CONFLICT/ERROR', 'TRANSFER OPT CARE TO OTHER VA', and 'WEATHER'. Above this list are radio buttons for 'Appointment Cancelled By', with 'Cancelled by Clinic' selected. At the bottom left is a 'PID Date' field showing '09/03/2020'. At the bottom right are 'OK' and 'Cancel' buttons.

Figure 4: Cancel Appointment Dialog Box, Dropdown Option to Select National Comment

Cancel Appointment

Appointment Cancelled By

☒ Cancelled by Clinic

☐ Cancelled by Patient

Reason for Cancellation (Select one)

APPOINTMENT NO LONGER REQUIRED

CLINIC CANCELLED

CLINIC STAFFING

INPATIENT STATUS

OTHER

PANDEMIC

PATIENT DEATH

PATIENT NOT ELIGIBLE

SCHEDULING CONFLICT/ERROR

TRANSFER OPT CARE TO OTHER VA

WEATHER

PID Date:

09/03/2020

Select National Comment

#TELE#

#VVC#

COVID19 #TELE#

COVID19 #VVC#

SRV#TEST#

TEST#LOCAL#

TESTING 123

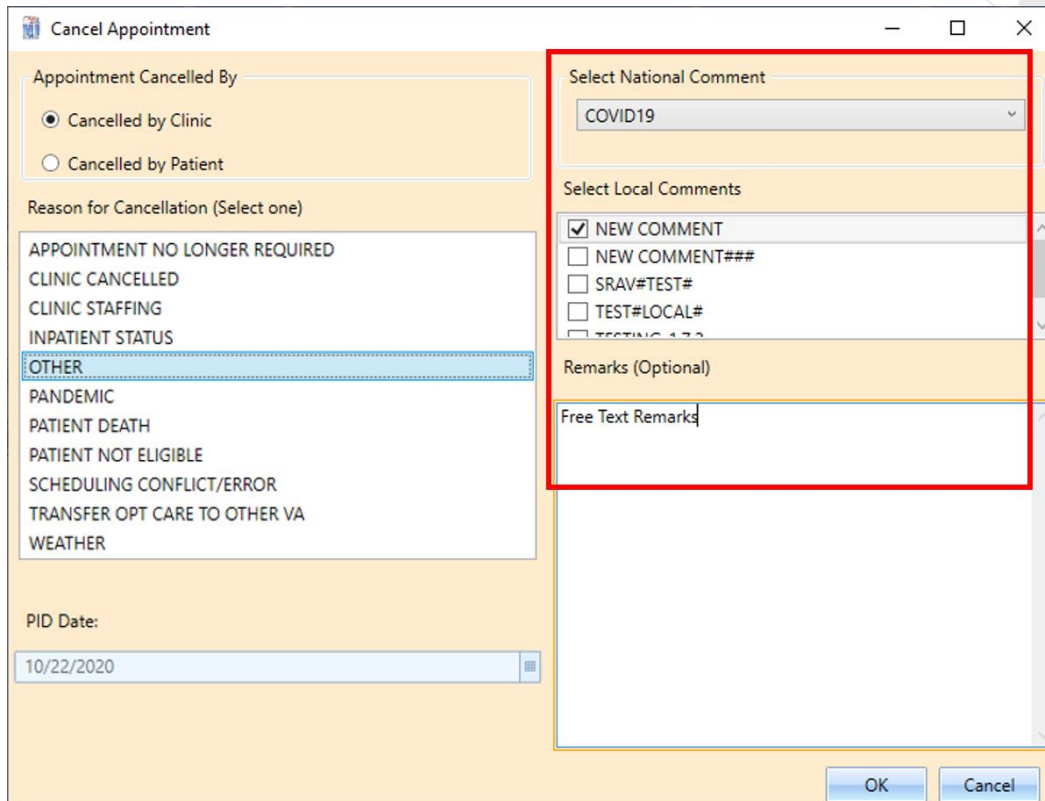
Remarks (Optional)

OK Cancel

Figure 5: Tool Tip for #TELE# Displayed When You Hover Over It.

3.2.2 New Local Hashtag Options

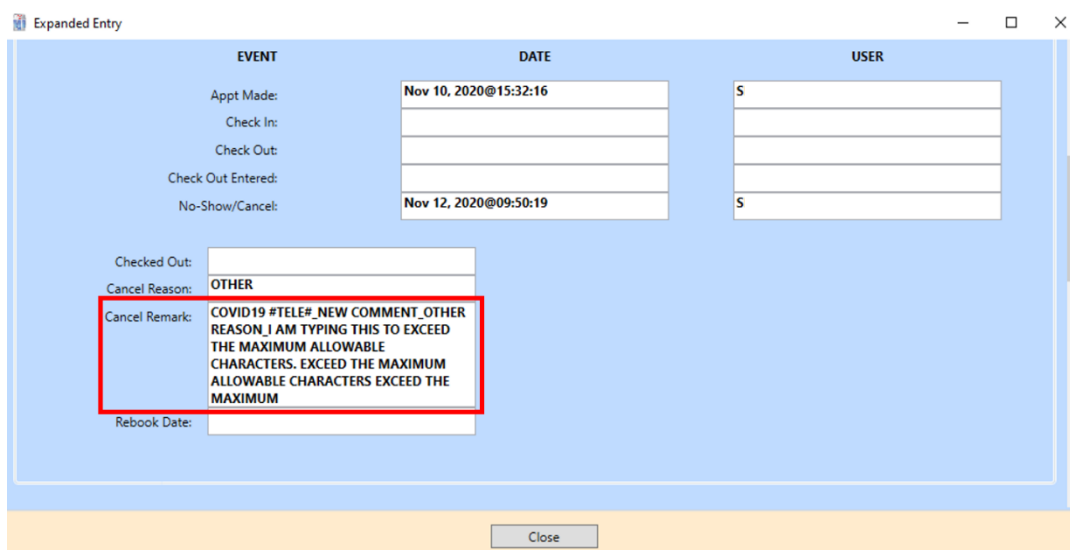
The local comment field is a checkbox list control that allows the user to select multiple local comments. The scheduler can now choose a National Comment and then choose a Local Comment. If needed, they will also be able to type “free text” in the Remarks section.



The "Cancel Appointment" dialog box is shown. It has a title bar with a close button. The main area is divided into several sections. On the left, under "Appointment Cancelled By", there are two radio buttons: "Cancelled by Clinic" (selected) and "Cancelled by Patient". Below this is a section titled "Reason for Cancellation (Select one)" with a list of options: "APPOINTMENT NO LONGER REQUIRED", "CLINIC CANCELLED", "CLINIC STAFFING", "INPATIENT STATUS", "OTHER" (highlighted), "PANDEMIC", "PATIENT DEATH", "PATIENT NOT ELIGIBLE", "SCHEDULING CONFLICT/ERROR", "TRANSFER OPT CARE TO OTHER VA", and "WEATHER". Below this list is a "PID Date:" field with a date picker showing "10/22/2020". On the right, there is a "Select National Comment" dropdown menu showing "COVID19". Below that is a "Select Local Comments" section with a list of checkboxes: "NEW COMMENT" (checked), "NEW COMMENT###", "SRV#TEST#", "TEST#LOCAL#", and "TESTING 123". Below this is a "Remarks (Optional)" section with a "Free Text Remarks" text area containing the text "Free Text Remarks". At the bottom right are "OK" and "Cancel" buttons.

Figure 6: Cancel Appointment Dialog Box Showing the "COVID19" National Template was Selected, the "NEW COMMENT" Local Comment Checkbox was Selected, and the User Typed "Free Text Remarks" in the Remarks Box.

When schedulers look at the expanded entry, they will see the full cancel remark that is created by the drop-down selections and any additional free text added at the end of the remark. The selections and the remark will populate as one sentence in the "Cancel Remarks" section.



The "Expanded Entry" dialog box is shown. It has a title bar with a close button. The main area is divided into three columns: "EVENT", "DATE", and "USER". The "EVENT" column contains labels for "Appt Made:", "Check In:", "Check Out:", "Check Out Entered:", and "No-Show/Cancel:". The "DATE" column contains date and time pickers for "Nov 10, 2020@15:32:16", "Nov 12, 2020@09:50:19", and "Nov 12, 2020@09:50:19". The "USER" column contains a list of users with initials "S". Below this is a "Checked Out:" field. Below that is a "Cancel Reason:" field showing "OTHER". Below that is a "Cancel Remark:" field containing the text "COVID19 #TELE#_NEW COMMENT_OTHER REASON_I AM TYPING THIS TO EXCEED THE MAXIMUM ALLOWABLE CHARACTERS. EXCEED THE MAXIMUM ALLOWABLE CHARACTERS EXCEED THE MAXIMUM". Below this is a "Rebook Date:" field. At the bottom is a "Close" button.

Figure 7: Expanded Entry Dialog Box showing the cancel remark section that contains the choices made.

3.2.3 Cancellation Remark Warning Message

When a user, typing a free text remark under the Remarks section of the cancel appointment dialog box, exceeds the character limit a warning message pop-up. As shown below on the Cancel Appointment Warning pop-up message, if the user clicks OK, the characters after 166 will be truncated. If the user clicks the Cancel button, they can edit the remarks.

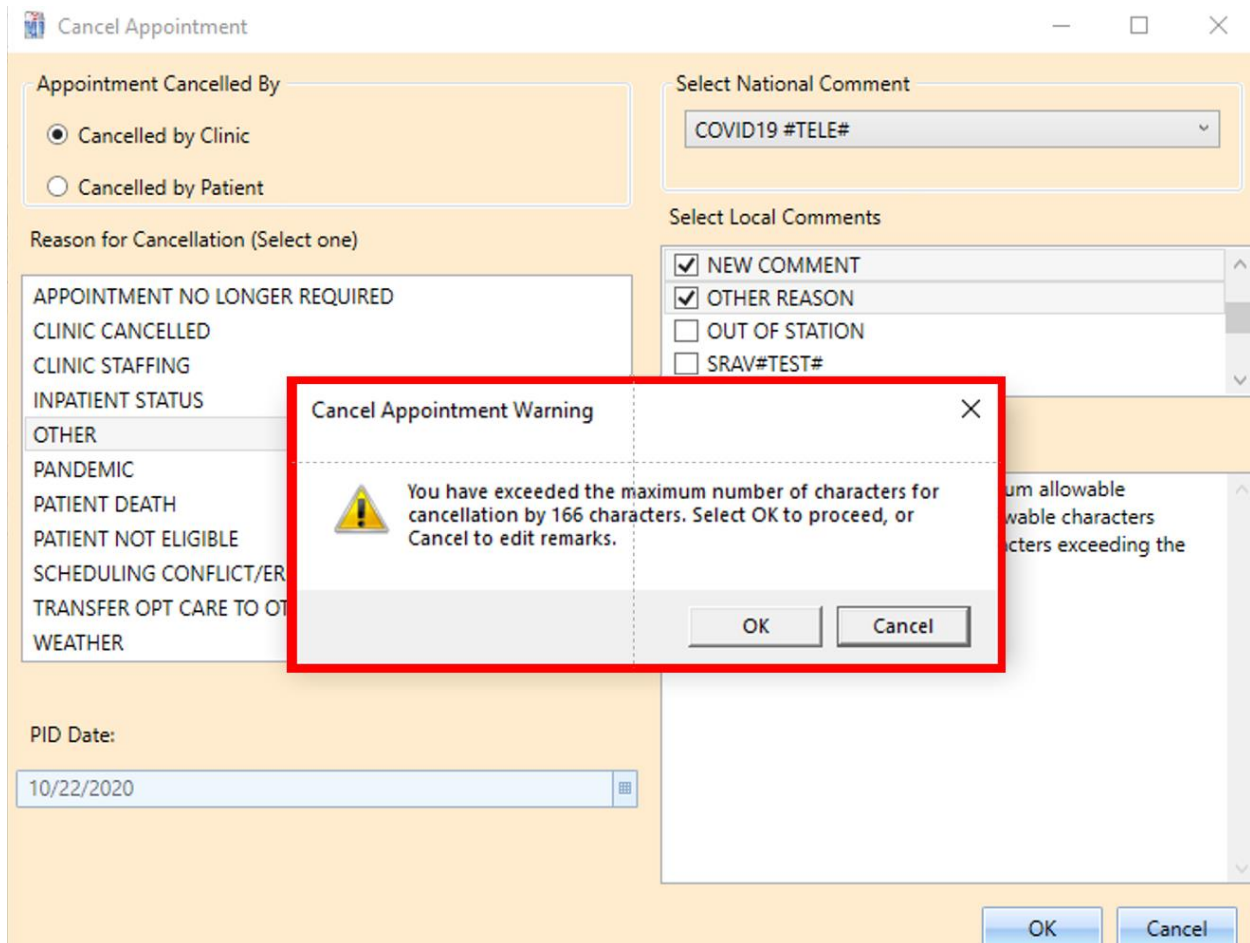


Figure 8: Warning Message Showing Due to the user Typing in Excess of the Character Limit.

3.2.4 Adding New Local Cancellation Hashtag

1. From Supervisor Menu [SDSUP], select Create/Edit Local Cancellation Comments option.
2. Select SDEC CANCELLATION COMMENT HASH TAG: ex. BAD WEATHER
3. Enter Y when asked if this is a new SDEC CANCELLATION COMMENT
4. Hash tag name will be displayed, hit enter
5. Under "COMMENT TEXT" add desired Comment text.

ACR Ambulatory Care Reporting Menu ...
AM Appointment Management
CONS Consult/Request Main Menu ...
SDRR Recall Reminder Main Menu
Appointment Menu ...
Automated Service Connected Designation Menu ...
Outputs ...
Supervisor Menu ...
Vista Scheduling GUI Resource Mgmt Report Data
Select OPTION NAME: SDSUP Supervisor Menu

Add/Edit a Holiday
Appointment Inquiry
Appointment Status Update Menu ...
Appointment Waiting Time Report
Appointments with missing resources
Appointments with no resource report
Automatically Fix Appointments with No Resource
Cancel Clinic Availability
Change Patterns to 30-60
Clinics without matching resource list
Convert Patient File Fields to PCMM
Create a resource
Create/Edit Local Cancellation Comments
Current MAS Release Notes
Edit Resource
Edit resource for an appointment
Encounter Inquiry
Enter/Edit Letters
Inactivate a clinic
List Appointments and Encounters by status
Look up on Clerk Who Made Appointment
Manually Fix Appointments with No Resource
Non-Conforming Clinics Stop Code Report
Pending RTC cleanup - by Date
Pending RTC cleanup - FULL
Print Clinic Installation Checklist
Purge Scheduling Data
Reactivate a Clinic
Release Appointment Request Locks
Remap Clinic
Resource Inquiry
Restore Clinic Availability
Scheduling Parameters
Set up a Clinic
Sharing Agreement Category Update
VS GUI Help Pane Edit
Wait List (Sch/PCMM) Utilities ...

Select Supervisor Menu <TEST ACCOUNT> Option: CREATE/EDIT Local Cancellation Comments
Select SDEC CANCELLATION COMMENT HASH TAG: BAD WEATHER
Are you adding 'BAD WEATHER' as
a new SDEC CANCELLATION COMMENT? No// Y (Yes)
HASH TAG: BAD WEATHER//
COMMENT TEXT: ADDING NEW LOCAL HASHTAG FROM SDSUP MENU

Figure 9: Add Local Cancellation Hashtag

3.2.5 Edit Local Cancellation Hashtag

1. From Supervisor Menu [SDSUP], select Create/Edit Local Cancellation Comments
2. Select SDEC CANCELLATION COMMENT HASH TAG: type “??” to choose from the list of existing Hash tags
3. From the list of hash tags, choose the hash tag you wish to edit and hit enter.
4. The selected hash tag name will be displayed in the next line, hit enter or type the new Hash tag name.
 - The maximum number of characters allowed in the hash tag name is 30.

5. The COMMENT TEXT shows the existing Text. Hit enter to keep it or “...” to make a change to the comment text.

```
ACR  Ambulatory Care Reporting Menu ...
AM   Appointment Management
CONS Consult/Request Main Menu ...
SDRR Recall Reminder Main Menu
      Appointment Menu ...
      Automated Service Connected Designation Menu ...
      Outputs ...
      Supervisor Menu ...
      Vista Scheduling GUI Resource Mgmt Report Data
Select OPTION NAME: SDSUP      Supervisor Menu

      Add/Edit a Holiday
      Appointment Inquiry
      Appointment Status Update Menu ...
      Appointment Waiting Time Report
      Appointments with missing resources
      Appointments with no resource report
      Automatically Fix Appointments with No Resource
      Cancel Clinic Availability
      Change Patterns to 30-60
      Clinics without matching resource list
      Convert Patient File Fields to PCMM
      Create a resource
      Create/Edit Local Cancellation Comments
      Current MAS Release Notes
      Edit Resource
      Edit resource for an appointment
      Encounter Inquiry
      Enter/Edit Letters
      Inactivate a clinic
      List Appointments and Encounters by status
      Look up on Clerk Who Made Appointment
      Manually Fix Appointments with No Resource
      Non-Conforming Clinics Stop Code Report
      Pending RTC cleanup - by Date
      Pending RTC cleanup - FULL
      Print Clinic Installation Checklist
      Purge Scheduling Data
      Reactivate a Clinic
      Release Appointment Request Locks
      Remap Clinic
      Resource Inquiry
      Restore Clinic Availability
      Scheduling Parameters
      Set up a Clinic
      Sharing Agreement Category Update
      VS GUI Help Pane Edit
      Wait List (Sch/PCMM) Utilities ...

Select Supervisor Menu <TEST ACCOUNT> Option: create/edit Local Cancellation Comments
Select SDEC CANCELLATION COMMENT HASH TAG: 22

Choose from:
1.7.2#COMMENT TEST#
BAD WEATHER
NEW COMMENT###
SRAV#TEST#
TEST#LOCAL#
TESTING__1.7.2

      You may enter a new SDEC CANCELLATION COMMENT, if you wish
      A hash tag is an abbreviation for a standard cancellation comment.

Select SDEC CANCELLATION COMMENT HASH TAG: BAD WEATHER
HASH TAG: BAD WEATHER// DUE TO BAD WEATHER
COMMENT TEXT: ADDING NEW LOCAL HASTAG FROM SDSUP MENU
Replace
```

Figure 10: Edit Local Cancellation Hashtag

3.3 Virtual Care Manager Launch Page

When scheduling an appointment into a VA Video Connect (VVC) Clinic, the VCM launch page will automatically open in the default browser.

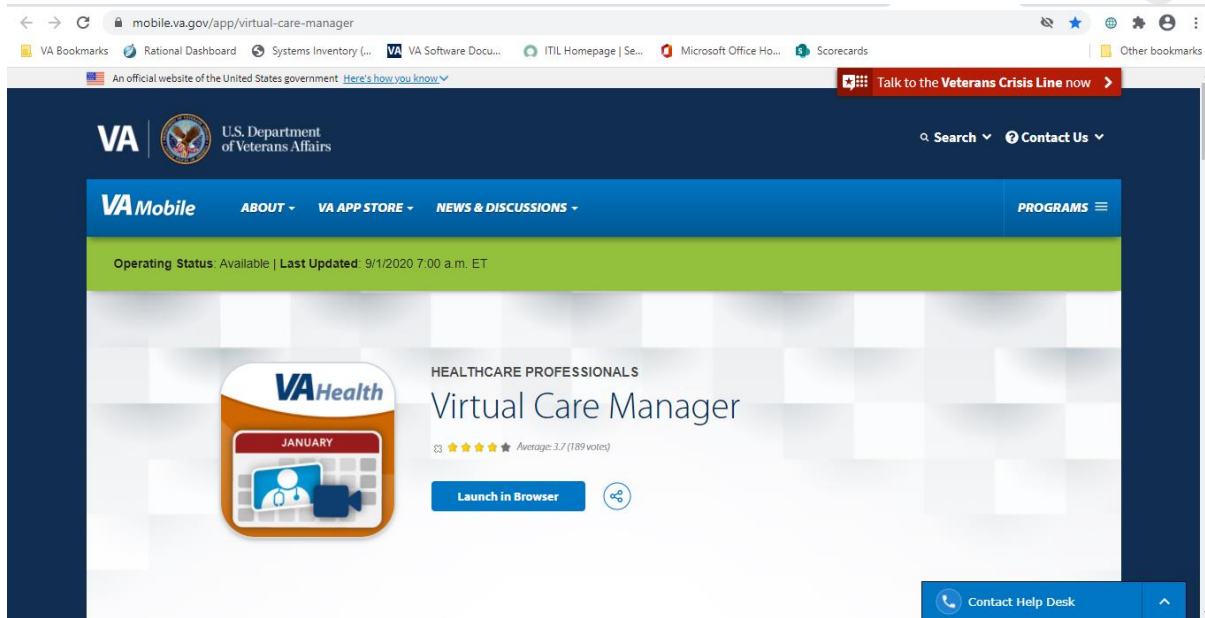


Figure 11: VCM Launch Page